



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Atty Lucich, Jr., Nicholas L. (of Helon & Manfredo, for Petitioner Claudia Spaulding)

(1) Third Account and Report of Successor Conservator and (2) Petition for Conservator's Fees and Attorney's Fees

Age: 64 years		CLAUDIA SPAULDING , Successor Conservator of the Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 1/1/2012 - 12/31/2013	<p>Note: The Conservatorship Estate includes a ½ interest in a residence; the other ½ interest is owned by the Trustee of the ELIZABETH CATHERINE ANGELL TRUST, of which the <i>Fourteenth Account</i> is noted on Page 4 of this calendar.</p> <p>Note: Court will set status hearing as follows:</p> <ul style="list-style-type: none"> Thursday, August 6, 2015 at 9:00 a.m. in Dept. 303 for the fourth accounting. <p>Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.</p>
Cont. from		Accounting - \$153,443.85	<p>Reviewed by: LEG</p> <p>Reviewed on: 6/2/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 - Angell</p>
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$ 36,533.62	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$ 28,795.41 (\$1,370.97 cash)	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Conservator - \$8,565.00 (per declaration and itemization, for 438 hours @ \$25.00/hour)	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney - \$1,000.00 (less than Local Rule 7.16 for 24-month account period)	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Petitioner prays for an order:	
<input type="checkbox"/>	Letters	1. Approving, allowing, and settling the Third Account;	
<input type="checkbox"/>	Duties/Supp	2. Confirming and approving all acts and transactions of the Conservator relating to the conservatorship; and	
<input type="checkbox"/>	Objections	3. Authorizing the Conservator commissions and Attorney fees.	
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620	Court Investigator Dina Calvillo's Report was filed 9/4/2013.	
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

		<p>GERALD H. BLUM, Father, was appointed Conservator of the Estate on 4-7-88.</p> <p>The Conservator's 7th Account was settled on 3-20-12.</p> <p>On that date, the Court set this status hearing for the filing of the 8th Account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u></p> <p>Account filed 6-2-14 is set for hearing on 7-9-14.</p>
Cont from 052114			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 6-2-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2 - Blum</p>	

DOD: 11/14/2003	CLAYTON JEFFREY MASSEY and RAYMOND DEAN MASSEY were appointed as Co-Executors with full IAEA authority and without bond on 5/11/2004.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 5/9/14.</u> Minute order set an Order to Show Cause Re: Clayton Massey's failure to appear. See page 3B.
	Letters issued on 5/11/2004.	1. Need inventory and appraisal and first account and/or petition for final distribution.
Cont. from 090613, 110113, 010314, 030714, 050914, 050914	Inventory and appraisal was due on 10/11/2004.	
Aff.Sub.Wit.	First account and/or petition for final distribution was due on 5/11/2005.	
Verified	Notice of Setting Status Hearing was sent to Attorney Richard Hemb on 7/17/2013.	
Inventory	Status Report of Attorney Richard Hemb filed on 5/6/14 states an inventory and appraisal was prepared by Steven Diebert with a total value of \$193,489.92 and sent to the clients for review and signature. Mr. Hemb states he also prepared a declaration whereby the property would be distributed to an inter vivos trust and a First and Final Account and Report of Executors and Petition for Settlement, Allowance of Commissions and Fees and Final Distribution. The documents were never executed by his clients.	
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt	Mr. Hemb states he personally visited the residence located at 12557 E. Herndon in Clovis and found Mr. Massey to reside at that location. Mr. Hemb states he had a personal conversation with Mr. Massey to explain the need to resolve the probate estate.	
CI Report		
9202	Since Mr. Hemb's personal visit to Mr. Massey's home, his office has sent reminder letters to Mr. Massey. To date, Mr. Massey has not contacted his office to conclude the estate.	
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 6/3/14
		Updates:
		Recommendation:
		File 3A – Massey

DOD: 11/14/2003		<p>CLAYTON JEFFREY MASSEY and RAYMOND DEAN MASSEY were appointed as Co-Executors with full IAEA authority and without bond on 5/11/2004.</p> <p>Letters issued on 5/11/2004.</p> <p>Inventory and appraisal was due on 10/11/2004.</p> <p>First account and/or petition for final distribution was due on 5/11/2005.</p> <p>Minute order dated 5/9/14 set this Order to Show Cause Re: Clayton Massey's failure to appear. The Court Orders Clayton Massey to be personally present on 6/5/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 6/3/14	
		Updates:	
		Recommendation:	
		File 3B - Massey	

Atty Lucich, Jr., Nicholas L. (of Helon & Manfredo, for Petitioner Claudia Spaulding)

**Fourteenth Account and Report of Trustee, Petition for Settlement Thereof and
for Allowance of Trustee's Fees and Attorney's Fees**

DOD: 12/22/1993	CLAUDIA SPAULDING , Trustee, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:
	Account period: 1/1/2012 - 12/31/2013		
Cont. from	Accounting -	\$153,443.85	
Aff.Sub.Wit.	Beginning POH -	\$ 36,533.62	
<input checked="" type="checkbox"/> Verified	Ending POH -	\$277,243.75 (\$28,187.17 cash)	
Inventory	Trustee -	\$2,910.00	
PTC	(per declaration and itemization on Exhibit B, for 97 hours @ \$30.00/hour)		
Not.Cred.	Attorney -	\$900.00	
<input checked="" type="checkbox"/> Notice of Hrg	(per declaration and itemization on Exhibit C, for 3 hours @ \$300.00/hour)		
<input checked="" type="checkbox"/> Aff.Mail	Petitioner states that during the period covered by this Fourteenth Account, partial redemption of mutual funds was necessary to provide funds to the Conservatorship of MARJORIE JUNE ANGELL , the Trust Beneficiary, for her care (described on Schedule 2; Schedule 3, Disbursements During Account period, indicates monthly transfers to the Conservatorship during the account period totaling \$115,375.50 .)		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report	Petitioner prays for an order:		
9202	4. Approving, allowing, and settling the Fourteenth Account;		
<input checked="" type="checkbox"/> Order	5. Confirming and approving all acts and transactions of the Trustee during the period of this account; and		
Aff. Posting	6. Authorizing the Petitioner to pay the Trustee and Attorney fees.		
Status Rpt		Reviewed by: LEG	
UCCJEA		Reviewed on: 6/2/14	
Citation		Updates:	
FTB Notice		Recommendation:	
		File 4 - Angell	

(1) First and Final Accounting and Report of Status of Administration; (2) for Allowance of Statutory Attorney and Administrator's Compensation; (3) for Reimbursement of Costs Advanced; and (4) Petition to Close Estate

DOD: 08/15/04		CAROLYN LEWIS , Executor, is Petitioner. Account period: 08/15/04 – 06/08/06 Accounting - \$200,000.00 Beginning POH- \$200,000.00 Ending POH - \$100,000.00 Executor - \$4,000.00 (statutory) Attorney - \$4,000.00 (statutory) Costs - \$1,273.00 (filing fees, publication, probate referee) Distribution, pursuant to decedent's will, is to: Carolyn Lewis- all funds remaining to be distributed	NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR Amended Petition filed 05/22/14 set for hearing on 06/23/14 1. The Petition states that the Executor, Carolyn Lewis, is the Petitioner, however, the Petition is not verified by Ms. Lewis and the Verification states that Ms. Lewis' whereabouts are unknown to the attorney. Therefore, it appears that the attorney should be the Petitioner pursuant to Probate Code § 10953. 2. The Petition indicates that there were three creditor's claims filed against the estate totaling \$627.00, however, a review of the docket and the file did not reveal any creditor's claims having been filed nor any Allowance/Rejection of Creditor's Claims. Need clarification. The Petition further indicates that it is unknown whether these claims have been paid. The Court may require further information. 3. The Petition is requesting authorization of payment of the Statutory Fee to the Executor and the Attorney. The Petition states that Petitioner (Carolyn Lewis) acknowledges and understands that she is responsible for payment of the attorney statutory fee. It is unclear how this statement can be made when the attorney states in the verification that he has lost contact with Ms. Lewis. 4. The Petition requests that the full statutory fee be paid to the Executor and the Attorney, however, Probate Code § 12205 states that the Court may reduce compensation to the personal representative and/or attorney when the time taken to close the estate exceeds the time prescribed in the code, etc. The decedent died in 2004 and Letters were issued on 12/08/05. No explanation is provided in the Petition indicating that there was a reason for the delay in closing the estate. The Court may consider reducing the requested compensation.		
Cont. from 050114					
<input type="checkbox"/>	Aff.Sub.Wit.				
<input type="checkbox"/>	Verified				X
<input checked="" type="checkbox"/>	Inventory				
<input checked="" type="checkbox"/>	PTC				
<input checked="" type="checkbox"/>	Not.Cred.				
<input checked="" type="checkbox"/>	Notice of Hrg				
<input checked="" type="checkbox"/>	Aff.Mail				w/o
<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input type="checkbox"/>	Pers.Serv.				
<input type="checkbox"/>	Conf. Screen				
<input type="checkbox"/>	Letters				12/08/05
<input type="checkbox"/>	Duties/Supp				
<input type="checkbox"/>	Objections				
<input type="checkbox"/>	Video Receipt				
<input type="checkbox"/>	CI Report				
<input checked="" type="checkbox"/>	9202				
<input checked="" type="checkbox"/>	Order				
<input type="checkbox"/>	Aff. Posting				
<input type="checkbox"/>	Status Rpt				
<input type="checkbox"/>	UCCJEA				
<input type="checkbox"/>	Citation				
<input checked="" type="checkbox"/>	FTB Notice				
NEEDS/PROBLEMS/COMMENTS (Cont): 5. The costs requested included a \$60.00 filing fee for the attorney's Motion to Withdraw as Counsel. It is unclear why should be an expense of the Estate. The Court may reduce the costs reimbursement by \$60.00. 6. Neither the Petition, nor the Order indicates the dollar amount to be distributed. Local Rule 7.6.1A. states that monetary distributions must be stated in dollars in the Order.		Reviewed by: JF Reviewed on: 06/03/14 Updates: Recommendation: File 5A - Geise			

Notice of Motion and Motion to be Relieved as Counsel - Civil

DOD: 08/15/04		PHILIP M. FLANIGAN , attorney for Executor CAROLYN LEWIS, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		CAROLYN LEWIS , daughter, was appointed Executor with full IAEA and without bond on 12/06/05. Letters Testamentary were issued on 12/08/05.	<u>CONTINUED FROM 05/01/14</u>
Cont. from 032414, 050114			
<input type="checkbox"/>	Aff.Sub.Wit.	Petitioner states that he has been unable to contact his client and has an outdated address and telephone number. Ms. Lewis sold the property where she was previously living and several attempts to locate her or obtain a new address and phone number have been unsuccessful. Petitioner states that the inability to contact the client renders it unreasonably difficult to close probate and carry out the representation effectively.	Note: It is unclear whether Mr. Flanigan wishes to pursue this Motion based on his filing a First & Final Account (page 5A).
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/o		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 06/03/14
			Updates:
			Recommendation:
			File 5B – Geise

(1) Eighth Account and Report of Co-Conservators; Petition for its Settlement; (2) Allowance of Compensation to Co-Conservators, (3) for Attorney Fees and Reimbursement of Costs Advanced

			SALOME and MARIA MARTINEZ , parents and co-conservators, are Petitioners.	NEEDS/PROBLEMS/COMMENTS: 1. One of the line items in the attorney fee request is \$25 for 0.2 hours to schedule courtcall. This task is secretarial in nature and is considered by the Court to be a cost of doing business. See Local Rule 7.17.B. Therefore, the attorney fees will be reduced by \$25 to \$2,472.50.
			Account period: 10-18-11 through 10-17-13 Accounting: \$633,711.33 Beginning POH: \$438,788.43 Ending POH: \$355,190.72 (148,270.22 is cash)	
	Aff.Sub.Wit.		Conservators: \$1,920.00 (for an average of 8 hours/month @ \$10/hr x 24 months for services including payment of monthly expenses, procuring medical supplies, maintaining the home, etc.)	
✓	Verified			
	Inventory		Attorney: \$2,497.50 plus \$551.00 in costs (for 17.80 attorney and paralegal hours @ \$100-200/hr for preparation of this accounting, legal research concerning lien on van purchased during this account period,	
	PTC			
	Not.Cred.		Petitioners pray for an order as follows: 1. Settling and allowing the account and report and approving and confirming the acts of petitioners as co-conservators; 2. Approving payments during this account period for the 24-hour in-home care for the Conservatee of \$4,000/month and payment toward the mortgage of \$1,000/month; 3. Authorizing payment of the Court investigation fees of \$350; 4. Allowing compensation of \$1,920.00 to the co-conservators for services to the Conservatee; 5. Authorizing payment to the attorney of \$2,497.50 plus \$551 in costs; 6. For such other orders as the Court deems proper.	
✓	Notice of Hrg			
✓	Aff.Mail	w		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	2620(c)			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Atty Wright, Janet L. (for Kate Singh & Hubert Mitchell – Co-Conservators of the Person/Petitioners)
 Petition for Approval of Conservator's Fees for Co Conservator of the Person, Kate
 A. Singh

Age: 77		KATE SINGH and HUBERT MITCHELL, Co-Conservators of the Person, are Petitioners. Petitioners state: 1. Letters of Conservatorship of the Person were issued to Petitioners on 03/12/12. Letters of Conservatorship of the Estate were issued to Bruce Bickel on 03/29/12. 2. Co-Conservator of the Person, Kate Singh, has received no previous compensation from the estate. By Court order dated 12/13/13, Co-Conservator of the Person, Hubert Mitchell received reimbursement of costs expended to marshal assets of the conservatorship and reimbursement for costs to attend the hearing on the general Conservatorship Petition on 03/29/12 in lieu of conservator's fees. 3. Ms. Singh now requests payment of fees for general services performed by her on behalf of the Conservatee from 10/02/11 – 07/03/13. Ms. Singh contends that she has spent in excess of 263 hours assisting the conservatee during this period and believes that a reasonable fee for her services is \$5,278.00 (263.9 hrs @ \$20/hr). 4. Services provided are itemized by date and include: a. 45 hours relating to the transition of conservatee from Los Angeles to Fresno; b. 65.4 hours for research and transition of conservatee to a residential care facility/visitation to ensure quality of care; c. 21 hours for assistance in management of the conservatee's assets; d. 27.8 hours for initiation of conservatorship proceedings; e. 55.4 hours for selection and transition of conservatee to Cottonwood Carehome/visitation to ensure quality of care; f. 29 hours for coordination of conservatorship estate matters with Bruce Bickel; g. 13.7 hours related to the hospitalization of the conservatee; and h. 6.6 hours for miscellaneous conservatorship issues. 5. Petitioners are informed and believe that the conservatee has sufficient assets on hand to pay the requested fees. Petitioners pray for an Order: 1. Authorizing Conservator of the Estate, Bruce Bickel, to pay to Conservator of the Person, Kate Singh, the sum of \$5,278.00 for services rendered.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> It is unclear why this fee request was not included with the First Account filed 06/20/13 to avoid the expense of an additional filing fee. It is the Court's preference that requests for fees are filed in conjunction with accountings in order to minimize costs to the conservatee.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: JF Reviewed on: 06/03/14 Updates: Recommendation: File 7 - Mitchell	

Atty Rube, Melvin K., sole practitioner (for Petitioner Ann R. Joseph, Executor)

(1) First and Final Account and Report of Executor and Petition for Settlement Thereof and (2) for Final Distribution

DOD: 4/15/2010		ANN R. JOSEPH , spouse and Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 10/23/2012 – 4/15/2014	1. Petition requests distribution to Petitioner as Trustee of the HARRY JOSEPH AND ANN RUTH JOSEPH LIVING TRUST . Pursuant to Local Rule 7.12.5, if property in the estate is to be distributed to a pre-existing trust, the current trustee must file a declaration setting forth the name of the trust, its establishment date, and taxpayer identification number, verifying that the trust is in full force and effect, and that the trustee has an executed copy of the trust in possession. Need a declaration of trust to be filed with the Court prior to distribution of the estate. 2. Need proposed order.
Cont. from		Accounting - \$677.95	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$635.42*	
<input type="checkbox"/>	Verified	Ending POH - \$661.90 (all cash)	
<input checked="" type="checkbox"/>	Inventory	*Final Inventory and Appraisal filed on 2/24/2013 reflected assets of \$17,231.26 , consisting mainly of Series E and EE Savings Bonds; however, Petitioner later determined the bonds except for those totaling \$131.59 were not part of Decedent's estate but had been liquidated by him sometime prior to his death; <i>Corrected Inventory and Appraisal</i> was filed 4/21/2014 showing a value of \$635.42 .	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.	Executor - waives	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney - waives	
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	102312	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
Distribution pursuant to Decedent's Will is to:			
ANN R. JOSEPH as Trustee of the HARRY JOSEPH AND ANN RUTH JOSEPH LIVING TRUST dated 10/26/1994 – entire estate consisting of \$661.90 cash .			
Reviewed by: LEG			
Reviewed on: 6/3/14			
Updates:			
Recommendation:			
File 8 - Joseph			

Atty Knapp, Bonnie J.; Kimball, Patrick K., of Glendale (for Petitioner Eric Schloen, Special Administrator)

Petition for Termination of Further Proceedings and Discharge of the Personal Representative

DOD: 11/28/2012		ERIC SCHLOEN, Special Administrator appointed without bond on 4/19/2013, is Petitioner. Letters expired 10/20/2014.	NEEDS/PROBLEMS/COMMENTS:
		I & A - waived per Order for Probate signed 4/19/2013 appointing Special Administrator.	
Cont. from		Petitioner states:	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	<ul style="list-style-type: none"> Petitioner, as agent of COMMUNITY REGIONAL MEDICAL CENTER, the hospital at which the Decedent died, was appointed Special Administrator for the limited purpose of obtaining Medi-Cal benefits for the decedent to settle medical bills incurred by decedent prior to his death; Petitioner has diligently searched for all assets of the Decedent but has not been able to discover any property of any kind belonging to the Decedent that would otherwise be subject to administration, and at all times prior to filing until the present time, no assets have been found, discovered or ascertained which would be applicable to this Estate; Through the extraordinary professional courtesies of Attorney DAVID N. KNUDSON, who was representing the interests of the Decedent's brother and children, Petitioner was informed that there was no real property or anything else which might have otherwise required an accounting, distribution or report (again) by this Estate; Consistent with Probate Code § 9202, Petitioner has given written notice to the CA Dept. of Health Care Services Estate Recovery Division, as well as the Franchise Tax Board's Probate Unit (<i>copy of notice and response from each attached</i>); As to the Franchise Tax Board (FTB), there was apparently some "difficulty" by and between it and the Decedent's <u>former wife</u> [<i>emphasis in original</i>]; Petitioner was able to have the FTB realize that neither the Estate nor Petitioner personally had anything to do with those "difficulties" [<i>emphasis in original</i>], however the FTB advised Petitioner that the FTB had made notes in their system and it was probable that the "difficulties" would have to wend their way "through the system" and resolve themselves between the FTB and Decedent's former wife [<i>emphasis in original</i>]; (<i>copy attached of FTB Notice of Action – Withdrawal dated 10/15/2013</i>); Petitioner has concluded the reason and purpose of this estate, and there is no longer any need for the continued administration of the estate; Medi-Cal eligibility has been established (<i>copy of proofs of eligibility attached</i>). <p>Petitioner prays for an Order: (1) Terminating further proceedings for the administration of the estate; and (2) Discharging Petitioner as the personal representative of the estate.</p>	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		W /
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: LEG	
		Reviewed on: 6/3/14	
		Updates:	
		Recommendation: SUBMITTED	
		File 9 - Colby	

Atty Cain, Thomas W., sole practitioner, of Walnut Creek (for Petitioner Kelly A. Munro)

Atty Kruthers, Heather H., of County Counsel's Office (for Public Administrator)

Petition to Determine Heirship

DOD: 08/19/2013		KELLY A. MUNRO , granddaughter, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:	
		Petitioner states:	<p>Note: PUBLIC ADMINISTRATOR was appointed Administrator with Full IAEA authority without bond on 10/17/2013. Letters issued 10/21/2013.</p> <p>1. <i>Petition</i> does not but should state the basis upon which she asserts that she is the sole heir of the estate rather than STEPHEN LAWSON, Decedent's son, entitled to inherit the estate pursuant to Probate Code § 6402. <i>Exhibit A, Family Chart</i>, indicates a May 1986 date of death for Stephen Lawson; a certified copy of the death certificate of STEPHEN LAWSON is not provided as part of the proofs attached to the <i>Petition</i>.</p> <p>Note: Proposed order finds that the Petitioner is the sole heir to the Decedent's estate, she is entitled to inherit all of the estate, and any additional property of the Decedent discovered subsequent to this order shall be distributed to Petitioner.</p>	
Cont From 5/21/14				
<input type="checkbox"/>	Aff.Sub.Wit.	<ul style="list-style-type: none"> • She is entitled to inherit under the laws of intestacy set forth in Probate Code §§ 6402(a) and 240; • No petition determining the entitlement to inherit the estate of the Decedent has been filed; • Petitioner's father, STEPHEN LAWSON, was Decedent's son from her first marriage; • Decedent remarried twice, and there was no issue from those marriages; • Petitioner is the sole heir to the Decedent's estate; • Attached as <i>Exhibit A</i> is the Family Chart showing the relationship of the Petitioner to the Decedent; • Attached as <i>Exhibit B</i> is a list of proofs verifying the heirship of the heir set forth above, [STEPHEN LAWSON, Decedent's son]; • Attached as <i>Exhibits C1 – C6</i> are copies of proofs showing the heirship; • Counsel for the Petitioner has the original documents in his possession and will file them with the Court or otherwise make them available to the Court at the hearing or other appropriate time. <p>Petitioner prays that the Court determine the heirship and entitlement to the Estate.</p>		
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
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<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 6/3/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 – McPike</p>		

Atty Cain, Thomas W., sole practitioner, of Walnut Creek (for Petitioner Lucinda Gant)

Atty Kruthers, Heather H., of County Counsel's Office (for Public Administrator)

Petition to Determine Heirship

DOD: 10/18/2013	LUCINDA GANT , maternal half-sister, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:
			Note: PUBLIC ADMINISTRATOR has authority under Probate Code § 7660 to administer this estate pursuant to <i>Ex Parte Order Granting Ex Parte Petition of Public Administrator under Section 7660(a)(1) of the California Probate Code</i> filed on 11/26/2013.
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
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<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

LUCINDA GANT, maternal half-sister, is Petitioner.

Petitioner states:

- Petitioner is entitled to inherit under the laws of intestacy set forth in Probate Code §§ 6402(a) and 240;
- No petition determining the entitlement to inherit the estate of the Decedent has been filed;
- The Decedent did not leave a spouse or child at the time of death;
- Petitioner is the only living sibling and is entitled to inherit all of the estate;
- Attached as *Exhibit A* is the Family Chart showing the relationship of the Petitioner to the Decedent;
- Attached as *Exhibit B* is a list of proofs verifying the heirship of the Petitioner;
- Attached as *Exhibits C1 – C6* are copies of proofs showing the heirship;
- Counsel for the Petitioner has the original documents in his possession and will file them with the Court or otherwise make them available to the Court at the hearing or other appropriate time.

Petitioner prays that the Court determine the heirship and entitlement to the Estate.

Reviewed by: LEG

Reviewed on: 6/4/14

Updates:

Recommendation:

File 11 - Gant

Helen DOD: 01/15/07		GREGORY S. SNIDER , successor trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Stuart DOD: 06/16/13			
		Petitioner states:	<p>Note: Amanda Bonk, decedent's granddaughter was appointed as Guardian Ad Litem for minor beneficiaries of the Trust – Paige Fowler, Hailey Bonk & Brooklyn Bonk. It is unclear whether the Guardian Ad Litem or her attorney (Melissa Webb) will be filing any opinion regarding the Petition on behalf of the minor beneficiaries.</p>
Cont. from		1. STUART R. SNIDER (the "Decedent") and HELEN R. SNIDER, husband and wife, as settlors and trustees, established the STUART AND HELEN SNIDER LIVING TRUST by declaration of trust dated 09/13/01 (the "Trust"). 2. Helen Snider died on 01/15/07. 3. Upon Helens death, the Trust remained a single trust and remained revocable by the Decedent as the surviving settlor. Decedent became the sole trustee of the Trust upon Helen's death. Decedent also retained the power to amend the Trust pursuant to Article Three, Section 3.2, which states: "After the death of the deceased settlor, the surviving settlor may at any time amend, revoke, or terminate, in whole or in part, any trust created by this instrument other than the Disclaimer Trust, which shall be irrevocable and not subject to amendment." Article 3.3 of the Trust states in relevant part: "Any amendments, revocation, or termination of any trust created by this instrument shall be made by written instrument signed by both settlors or by the settlor making the revocation, amendment, or termination and delivered to the trustee." 4. On 04/20/12, the Decedent amended the Trust by a First Amendment to the Trust. On 04/21/12, Decedent resigned as trustee of the Trust and Petitioner, Greg Snider, the son of Decedent, became the sole successor trustee. 5. On 05/30/12, the Decedent executed a document entitled "Last Will and Testament of Stuart Snider". 6. On 04/08/13, Decedent executed a document entitled "Last Will and Testament of Stuart Snider Revised". Continued on Page 2	1. Notice of hearing to Michael Bonk, Hailey Bonk, Heather DeVoto and Brooklyn Bonk was sent in care of Roger Bonk, notice of hearing to Paige Fowler was sent in care of Amanda Bonk, and notice of hearing to Jeanette Frye was sent in care of Dennis Frye; notice mailed to a person in care of another is insufficient, pursuant to California Rules of Court 7.51 (a)(2). 2. Need Order.
<input type="checkbox"/>	Aff.Sub.Wit.		
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<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

7. Decedent died on 06/16/13 and upon his death, the Trust became irrevocable. Petitioner continues to serve as the sole successor trustee of the Trust.
8. The Trust and First Amendment were prepared by Decedent's attorneys. After executing the First Amendment, Decedent indicated to Petitioner that he wanted to make additional changes to the Trust, but did not want to incur additional legal expenses to do so.
9. Due to Decedent's advanced Parkinsons disease, the Decedent was unable to write or type the Second Amendment and instead, he dictated the contents to his caregiver who then typed it and Decedent signed it.
10. A third Amendment was also dictated by the Decedent to his caregiver who typed it and Decedent signed it. The Third Amendment was also delivered to Petitioner as Trustee of the Trust.
11. The dispositive provisions of the Trust are set forth in Section 6.3 of the Trust. The First Amendment to the Trust revised these dispositive provisions in their entirety so that upon the death of Decedent, the Trust estate was to be distributed as follows:
 - a. Tangible personal property was to be distributed by memorandum or designated then the remainder was to be distributed to the Decedent's children: Gregory Snider and Sheryl Hastay (also known as Sheryl Kilgallen).
 - b. The sum of twenty five thousand dollars (\$25,000.00) was to be distributed to each of Decedent's children: Gregory Snider and Sheryl Hastay.
 - c. The sum of twelve thousand dollars (\$12,000.00) was to be distributed to each of the Decedent's grandchildren: Amanda Bonk, Michael Bonk, and Emily Hastay.
 - d. The sum of seven thousand dollars (\$7,000.00) was to be distributed to each of the Decedent's then living great-grandchildren: Paige Fowler and Hailey Bonk.
 - e. The sum of ten thousand dollars (\$10,000.00) was to be distributed to the Decedent's brother, David Snider.
 - f. The sum of five thousand dollars (\$5,000.00) was to be distributed to each of Martha Martinez Villegas and Jennifer Gutierrez, former employees of the Decedent;
 - g. The remaining trust estate was to be distributed in equal shares to the Decedent's children: Gregory Snider and Sheryl Hastay.
12. The Second Amendment revised the dispositive provisions in their entirety and specifically states as follows: "[e]verything else goes in a trust. I wish to give Greg, Sherry, Amanda, Emily, David and Jeanette \$10,000.00 each from the trust. The remaining amount in the trust is to be divided equally among Greg, Amy, Sherry, Amanda, Emily, Paige, Hilary, Michael and Heather." Petitioner alleges that the reference to Hilary is a typo and actually refers to Hailey Bonk. Greg and Sherry are the Decedent's children. Amanda, Emily and Michael are the Decedent's grandchildren. David is the Decedent's brother. Jeanette is the Decedent's girlfriend. Amy is the Decedent's daughter-in-law. Paige and Hailey are the then living great grandchildren of the Decedent. Heather is the partner of Decedent's grandson Michael.
13. The Third Amendment again revised the dispositive provisions in their entirety and specifically states as follows: "[t]rust funds are to be divided equally among: Greg, Sherry, Michael, Emily, Paige, Hilary, Jeanette, David, Amy, Heather and Michael and Heather's unborn child. Amanda will get my personal property that she stored for me including the wheelchairs." Michael and Heather's child, Brooklyn, was born after the Third Amendment was signed.
14. As evidenced by these amendments, the distribution plan for the Trust varies greatly depending upon which version or amendment of the Trust is found to be valid.
15. Both the Trust and First Amendment contain No-Contest Clauses differing in scope and breadth. By and through this Petition, Trustee Gregory Snider is not issuing any challenge to the validity of any of the respective Trusts or advocating for any position regarding same, but rather is seeking instruction from the Court as to which Trust and distribution plan the Trustee should enforce when distributing Trust assets.

Continued on Page 3

Dept. 303, 9:00 a.m. Thursday, June 5, 2014

16. Although entitled "Last Will and Testament of Stuart Snider", neither the Second nor Third Amendments comply with the requisite formalities to constitute a valid will under Probate Code § 6110 or 6111. However, the Second and Third Amendments may constitute a valid amendment to trust pursuant to Probate Code § 15401 and 15402.
17. Probate Code § 15401(a)(1) provides in part that "(a) A Trust that is revocable by the settlor or any other person may be revoked in whole or in part by any of the following methods: (1) By compliance with any method of revocation provided in the trust instrument."
18. Probate Code § 15402 provides that "Unless the trust instrument provides otherwise, if a trust is revocable by the settlor, the settlor may modify the trust by the procedure for revocation."
19. Under Probate Code § 17200(a), the Court has jurisdiction to determine the validity of a trust amendment. Accordingly, Trustee Gregory Snider requests this Court issue instructions as to the validity of the Second and Third Amendments.
20. It has been more than 40 days since the Decedent's death and the beneficiaries names in the Trust, First Amendment, Second Amendment and Third Amendment have all survived the survivorship period set forth in section 8.2 of the Trust.

Petitioner prays for an Order that:

1. The Court issue instructions as to the validity of the Second and Third Amendments to the Trust.
2. The Court instruct Trustee Gregory Snider to distribute the remaining assets of the Trust in accordance with the Court's finding on the validity of the Second and Third Amendments.

Atty Pape, Jeffrey B., of Pape & Shewan (for Raheleh Gohari, Trustee)

Status Hearing Re: Filing of the Bond or Proof of Deposit into a Blocked Account

Age: 56 years		<p>RAHELEH GOHARI, daughter and Agent for the Proposed Beneficiary, filed a <i>Petition by Agent Under Power of Attorney for Order to Establish Special Needs Trust</i> on 1/7/2014.</p> <p>Minute Order dated 3/24/2014 from the hearing on the petition states the Court acknowledges that a house and a car will be purchased. The Court approves the petition subject to counsel obtaining either a bond or blocked account for the remaining balance. The issue regarding any withdrawals is reserved. Matter set for Status Hearing Re filing proof of bond or deposit into blocked account on 4/21/2014.</p> <p>Order Authorizing Establishment of Special Needs Trust filed 4/8/2014 finds that proceeds of \$163,271.43 shall be paid to the Trustee of the Special Needs Trust, and the Trustee shall thereafter deposit the funds in a blocked account within 15 days of receipt of such funds.</p> <p>Status Report filed 5/27/2014 states:</p> <ul style="list-style-type: none"> The Farshad Gohari Special Needs Trust created pursuant to Order dated 4/8/2014 is established for the specific purpose of receipt, management and disbursement of workers compensation proceeds awarded for the benefit of Farshad Gohari; The Order Approving Compromise and Release was signed by the Workers' Compensation Judge on 5/6/2014 in the matter of [Workers' compensation case name] Claim Number [omitted]; The settlement funds are required to be paid within 30 days of [the 5/6/2014] Order; As of the date of this Status Report [5/27/2014], the funds have not been paid; A new status conference is requested to be set within the next 30 to 45 days. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 4/21/2014.</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
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<input type="checkbox"/>	CI Report			
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✓	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 6/3/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 – Gohari</p>		

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820,
1821, 2680-2682)

Age: 81		<div> PUBLIC GUARDIAN APPOINTED TEMPORARY GUARDIAN EXPIRES 06/05/2014 </div> <div> ROLAND BARNETT, Spouse, is Petitioner and requests appointment as Conservator of the Person with medical consent powers pursuant to Probate Code §2355. </div> <div> Voting rights affected </div> <div> A Capacity Declaration was filed on 4-1-14. Capacity Declaration of Madhava Narala supports the request for medical consent powers. The Capacity Declaration also includes a Dementia Attachment indicating that the proposed Conservatee has dementia and supporting dementia medication and placement powers; however, Petitioner has not requested dementia medication and placement powers under Probate Code §2356.5. </div> <div> Petitioner states the proposed Conservatee suffers from dementia, stroke, is unable to make decisions, be left alone, eat without assistance, dress and groom on her own, bathe on her own, etc. </div> <div> Petitioner's Declaration filed 5-2-14 states he and his wife have been married for over 50 years. He has not had any contact with her since she was removed from their home by her daughter. He has tried calling and visiting but her daughter simply won't let Petitioner see her. Petitioner was informed that the Court Investigator was not able to complete her investigation because she was also not able to speak with her. Petitioner states it was very hard to have his wife served with the citation, and was able to have their pastor do it. Petitioner states his wife looked at the papers, and then her daughter took them and threw them out. The pastor believes he is not welcome anymore to visit. Petitioner asked the pastor about his wife's condition, and he said that she was in a full size bed, isolated from the rest of the apartment, and that the bed was wet. Petitioner is very concerned for his wife's well-being. He loves her very much and looks forward to having her home again. </div> <div> Please see additional page </div>	NEEDS/PROBLEMS/COMMENTS: Minute Order of 05/06/2014: The Court appoints the Public Guardian as temporary conservator of the person. The temporary expires on 06/05/2014. The Public Guardian is directed to secure a neutral placement for the conservatee. In addition, the Public Guardian is directed to meet with the conservatee and the parties to determine if a conservatorship is necessary. The Public Guardian to determine if visitation by any of the parties is appropriate.
Cont. from			
	Aff.Sub.Wit.		
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	Inventory		
	PTC		
	Not.Cred.		
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✓	Aff.Mail		
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	Video Receipt		
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	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		

Reviewed by: LV

Reviewed on: 06/03/2014

Updates:

Recommendation:

File 14 - Barnett

Court Investigator Dina Calvillo filed a report on 4-30-14.

Court Investigator Dina Calvillo's report filed 06/03/2014.

Atty Magness, Marcus D. (for Brittany Marie Lane – Petitioner – Daughter)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 04/03/2014	BRITTANY MARIE LANE , daughter is petitioner and requests appointment as Administrator without bond.		NEEDS/PROBLEMS/COMMENTS:
	Petitioner is a resident of Columbus, Ohio.		
Cont. from	All heirs waive bond.		1. Proposed personal representative is a resident of Ohio. Probate Code 8571 states notwithstanding a waiver of bond, the court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the court.
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA – o.k.		
<input checked="" type="checkbox"/> Verified	Decedent died intestate.		
<input type="checkbox"/> Inventory	Residence: Fresno		
<input type="checkbox"/> PTC	Publication: The Business Journal		
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input checked="" type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			<p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thursday, 11/06/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 08/06/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters	Estimated value of the Estate: Personal property - \$50,000.00 Real property - \$350,000.00 Less Encumbrances (-\$300,000.00) Total - \$100,000.00		
<input checked="" type="checkbox"/> Duties/Supp	Probate Referee: Steven Diebert		
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: LV
			Reviewed on: 06/03/2014
			Updates:
			Recommendation:
			File 15 - Lane

**Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for
Failure to File a First Account or Petition for Final Distribution**

DOD: 7/27/2005	JEFFREY MCCLAY was appointed as Administrator with full IAEA authority and with bond set at \$252,100.00 on 5/23/2006.	NEEDS/PROBLEMS/COMMENTS:
		Continued from 5/2/14. Minute order re Order to Show Cause indicates there were no appearances. The Court imposed sanctions in the amount of \$500.00 against Thomas Alexander. Payment to be made no later than 5/23/14. Copy of the minute order was mailed to Attorney Alexander on 5/6/14.
Cont. from 030714, 050214	Bond of \$252,100.00 was filed on 8/31/2006.	<p>1. Need petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Aff.Sub.Wit.	Letters issued on 8/31/2006.	
Verified		
Inventory	Inventory and appraisal filed on 2/5/2007 showing the estate valued at \$300,000.00	
PTC		
Not.Cred.		
Notice of Hrg	Creditor's Claims filed:	
Aff.Mail	<ul style="list-style-type: none"> Cancer Care Associates - \$1,105.65 	
Aff.Pub.		
Sp.Ntc.	Notice of Status Hearing was mailed to attorney Thomas Alexander and Administrator Jeffrey McClay on 11/22/14.	
Pers.Serv.		
Conf. Screen		
Letters	Note: The mailing to Jeffrey McClay was returned as undeliverable.	
Duties/Supp		
Objections	Minute Order dated 3/7/14 states no appearances. The court directs that a copy of the minute order be sent to Thomas Alexander. The Court sets the matter for an Order to Show Cause regarding contempt, failure to appear and failure to respond to the Court's request. Thomas Alexander is ordered to be personally present on 5/2/14.	
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 6/3/14
		Updates:
		Recommendation:
		File 17 – McClay

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

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Aff.Sub.Wit.																															
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Recommendation:																															
File 18 - Hall																															

DOD: 04/09/12	<p>SCOTT WORTHINGTON, son, filed a Petition for Probate on 04/18/13, seeking to admit decedent's will to probate and be appointed as Executor without bond.</p> <p>CYNTHIA SCHMIDT, daughter, filed an Objection to Petition for Probate of Will on 05/29/13.</p> <p>The parties participated in a settlement conference on 01/13/14. Minute Order from 01/13/14 states: Counsel will submit settlement agreement per conference conversation. Status Hearing on 02/27/14, Courtcall allowed.</p>	NEEDS/PROBLEMS/COMMENTS:
		<p>CONTINUED FROM 05/07/14 As of 06/03/14, nothing further has been filed in this matter.</p> <p>1. Need Settlement Agreement and/or Status Update Report.</p> <p>Note: See page 21 for a related matter.</p>
Cont. from 022714, 041514,		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 11/26/2012		BETTY PHILLIPS and ROSE LEE LITTLE were appointed Executors with full IAEA and without bond on 6/11/2013.	NEEDS/PROBLEMS/COMMENTS:
		Letters issued on 6/11/2013.	Continued from 5/2/14. Minute order indicates there were no appearances. Copy of the minute order was mailed to Attorney Renge on 5/2/14.
Cont. from 110813, 012414, 050214		Minute order dated 6/11/2013 set this status hearing for the filing of the inventory and appraisal.	1. Need final inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
<input type="checkbox"/>	Aff.Sub.Wit.	Inventory and Appraisal, partial #1, was filed on 4/13/14 showing a value of \$615,000.00	<div><div>Reviewed by: KT</div><div>Reviewed on: 6/3/14</div><div>Updates:</div><div>Recommendation:</div><div>File 20 – Kiramidjian</div></div>
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Atty Rube, Melvin K. (for Scott Worthington – son/Petitioner)
 Atty Ramseyer, Ryan (for Cynthia Schmidt – daughter/Respondent)
 Atty Kruthers, Heather H. (for Public Guardian)

Status Hearing Re: Settlement Agreement

Celia DOD: 04/09/12	SCOTT WORTHINGTON , son, filed a Petition to Terminate an Irrevocable Trust on 05/23/13 and set for hearing on 07/15/13.	NEEDS/PROBLEMS/COMMENTS:
	At the 07/15/13 hearing, the Court set the matter for a settlement conference on 08/12/13.	CONTINUED FROM 05/07/14 As of 06/03/14, nothing further has been filed in this matter.
		Note: Public Guardian filed a Petition for Fees that was granted on 12/09/13. The Petition for Fees was filed without payment of a filing fee. Minute Order from hearing on 12/09/13 ordered that the Trustee of the Trust was to pay the filing fees. As of 05/02/14, the filing fees have not been paid and the Order for Fees has not been signed.
Cont. from 022714, 041514, 050714	Minute Order from settlement conference on 08/12/13 states: Parties engage in settlement discussions with the Court. Based on the discussions, the Public Guardian is appointed for the benefit of Fred Worthington. The Court directs the Public Guardian to meet with Fred Worthington and speak with counsel regarding an evaluation to determine the appropriate level of care for him. The Court obtains consent from all counsel to engage in ex parte communications with the Public Guardian. The Court directs that a list of items be prepared within two weeks and an order as set forth be prepared by counsel. The Court sets a Status Hearing for the Public Guardian on 09/09/13. The Court indicates for the minute order that Mr. Dornay's presence will not be required on 09/09/13. The Court will expect appropriate status reports to be filed for the upcoming hearings.	1. Need Settlement Agreement and/or Status Update Report.
Aff.Sub.Wit.		Note: Updated Status Conference Statement filed 05/06/14 states that Petitioner is currently reviewing and considering the proposed settlement agreement. A three week continuance is requested.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Continued on Page 2

Status Conference Statement of Petitioner Scott J. Worthington filed 02/25/14 states:

1. A settlement conference was held in this matter on 01/13/14. The parties are to submit a settlement agreement, and are still working on that agreement. The Settlement agreement is to include, but is not limited to the following:
 - a. The appointment of a neutral successor trustee to administer the assets of the Trust. Bruce Bickel has agreed to act as the successor trustee for the trust.
 - b. The transfer of Bank of America Acct. ending in 3121, amounting to approximately \$211,000.00 (the sole asset of Fresno County Superior Court Case No. 13CEPR00336) into *The Worthington Family Grantor Trust dated 12/28/11* (the "Trust").
 - c. All assets of Trust, including the residence located at 22561 Auberry Road, Auberry, CA are to be administered for the benefit of Frederick A. Worthington.
 - d. The successor trustee is to select the contractor from the bids submitted to make the necessary repairs to the residence located at 22561 Auberry Road, Auberry, CA so that Frederick Worthington can live at the residence with in-home care. The costs of the repairs are to be paid out of the assets of the Trust.
 - e. Frederick Worthington will require in home care services while he resides at the residence located at 22561 Auberry Road, Auberry, CA. In home care services are to be provided on a 24-hour basis for seven days a week. Said in home care services are to be paid with any income earned by Frederick Worthington while he resides at the Auberry residence and out of the Trust.
 - f. The successor trustee shall select the in-home care provider to provide the in home care services required for Frederick Worthington.
 - g. Petitioner shall be responsible for moving Frederick Worthington into the Auberry residence once the necessary repairs have been made.
 - h. The successor trustee shall take possession of all tangible and intangible personal property of Frederick Worthington currently in the possession of petitioner and respondent and deliver said property to Frederick Worthington.
2. Although certain items of tangible personal property have been returned to Frederick Worthington by Respondent, Cynthia Schmidt, according to petitioner, Scott Worthington, the following items of tangible and intangible personal property have not been returned:
 - a. *The Certificate of Crossing the Equator.*
 - b. The Merchant Marine ring from WWII.
 - c. The matching rings worn by Frederick Worthington and his brother.
 - d. Celia Worthington's ashes.
 - e. The glass figurines that were on the fireplace mantle.
 - f. The family photo album of Frederick Worthington's family.
 - g. Some old plates in a wooden box.
 - h. Three butterfly trays.
 - i. A life insurance policy belonging to Frederick Worthington.
 - j. Military dog tags belonging to Frederick Worthington.
3. Petitioner is also concerned that Cynthia Schmidt has not accounted for or provided an explanation for the following:
 - a. Bank of America CD ending in 1508 held in the name of Celia Worthington and having a value of \$35,135.26 on 02/15/11, which Petitioner believes was not added to Bank of America Acct ending in 3121 and is not part of the approximately \$211,000.00 held in that account.
 - b. The status of the car owned by Frederick Worthington.

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 01/09/13	JACKI DRIVER , girlfriend, was appointed Executor with full IAEA and without bond on 12/05/13. Letters Testamentary were issued on 12/05/13.	NEEDS/PROBLEMS/COMMENTS:
		<u>CONTINUED FROM 05/02/14</u>
		1. Need Inventory & Appraisal.
		Note: There were no appearances at the 05/02/14 hearing. A copy of the minute order was mailed to G. Bryan Pinion on 05/06/14.
Cont. from 050214		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 06/03/14
		Updates:
		Recommendation:
	File 22 – Rusconi	

Atty Mejia, Monica L (Pro Per – Petitioner – Maternal Grandmother)

Petition for Termination of Guardianship

Age: 4	MONICA L. MEJIA , Guardian/Maternal Grandmother, is Petitioner. Petitioner was appointed Guardian on 04/08/2013.		NEEDS/PROBLEMS/COMMENTS:
Cont. from	Father: ERNEST FERNANDEZ		1. Need Notice of Hearing.
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified	Mother: PRISCILLA MEJIA Consents and waives notice		2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination Guardianship or consent and waiver of notice or declaration of due diligence for:
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC	Paternal Grandfather: Not listed		<ul style="list-style-type: none"> • Ernest Fernandez (Father) • Paternal Grandfather (Not Listed) • Paternal Grandmother (Not Listed) • Maternal Grandmother (Not Listed)
<input type="checkbox"/> Not.Cred.	Paternal Grandmother: Not listed		
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>	Maternal Grandfather: Not listed	
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>	Petitioner states: Mother is back in the home and will take care of the minor.	
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.		Court Investigator Jennifer Young's	
<input type="checkbox"/> Pers.Serv.		report filed 05/30/2014.	
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			Reviewed by: LV
<input type="checkbox"/> Status Rpt			Reviewed on: 06/03/2014
<input type="checkbox"/> UCCJEA			Updates:
<input type="checkbox"/> Citation			Recommendation:
<input type="checkbox"/> FTB Notice			File 23 - Fernandez

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Emilio Age: 10		<p align="center"><u>GENERAL HEARING 07/22/2014</u></p> <p>CELIA RUIZ, paternal grandmother, is petitioner.</p> <p>Father (of Emilio): JOSE E. QUIROZ</p> <p>Father (of Jenifer): MARCOS MENDOZA, Declaration of Due Diligence filed 05/22/2014</p> <p>Mother: ARALI V. DE HARO, Declaration of Due Diligence filed 05/22/2014</p> <p>Paternal Grandfather (of Emilio): Jose Ruiz, Jr.</p> <p>Paternal Grandparents (of Jenifer): Unknown</p> <p>Maternal Grandfather: Alberto Gonzalez Maternal Grandmother: Luz Maria De Haro</p> <p>Petitioner states: she and other family members are traveling out of the states to be with an ill family member and would like to take the children. Petitioner states that the mother is absent, she is homeless, addicted to drugs and associates with known felons. Jenifer's father is nowhere to be found. Emilio's father is incarcerated. Petitioner states that the children have been residing with her since they were 4 and 8 years old.</p> <p>Petitioner requests that notice be waived to the mother, Arali, because she is nowhere to be found. She is requesting the notice be waived to the Emilio's father because he is incarcerated and that for Jenifer's father as well because petitioner has never seen him.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice for: <ul style="list-style-type: none"> • Jose E. Quiroz (Father of Emilio) • Marcos Mendoza (Father of Jenifer) Unless the Court dispenses with notice. <p>Note: Declaration of Due Diligence filed 05/22/2014 states that he was last seen in 2008, no other contact has been made after that.</p> <ul style="list-style-type: none"> • Arali V. De Haro (Mother) Unless the Court dispenses with notice. <p>Note: Declaration of Due Diligence filed 05/22/2014 states that she was last seen December 2013 when she signed a notarized letter giving the petitioner custody.</p> <ol style="list-style-type: none"> 3. Need Confidential Guardian Screening Form. 4. Need UCCJEA. 	
Jenifer Age: 16				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			n/a
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
	Conf. Screen			x
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA	x		
	Citation			
	FTB Notice			
<p>Reviewed by: LV</p> <p>Reviewed on: 06/03/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 24 – Gonzalez/Mendoza</p>				